Corporate Project Status Reports – February to May 2023

Project Status Indicators

Factor Status	Green	Yellow	Red
Budget – In-Year	The project in-year expenditures are expected to be completed within the approved budget with a possible deviation of less than 5%.	The project in-year expenditures are at risk (likelihood > 50%) of going over budget by more than 5% but less than 20%.	The project in-year expenditures are at risk (likelihood > 50%) of going over budget by more than 20%.
Budget – Future	Future funding is allocated and committed.	Approved funding is not sufficient to complete the project. Additional funding will be required in a subsequent budget.	Approved funding is not sufficient to complete the project. Additional funding will be required in a subsequent budget but required amount is unknown.
Schedule	The project is on track for completion as per the approved delivery date with a possible deviation of less than 5%.	The project is at risk (likelihood > 50%) of missing the delivery date by more than 5% but less than 20%.	The project is at risk (likelihood > 50%) of missing the delivery date by more than 20%.
Scope	The project is on track to achieve the approved scope.	The project may be at risk of failing to achieve the approved scope.	The project is at high risk of failing to achieve the approved scope.
Overall Health	The project is currently on track.	The instant that a yellow state above is present, the overall project health becomes yellow.	The instant that a red state above is present, the overall project health becomes red.

Table of Contents

Program/Project Status Report – Enterprise Resource Planning (ERP) Program
Reported By: Ade Ogunkoya, Project Mgr.; Rob Delorme, Snr. Program Mgr.

Reporting Period: Feb 2023 – May 2023

Project Summary

- Business transformation initiative focused on people, processes, technology, data, and information required to deliver human resources, payroll and financial functions.
  - Workday solution implementation for Human Capital Management, Financials, Payroll, Reporting & Analytics
- Aligned to Vision to Focus (Focus Area 5) and the corporate IT Strategy

Key Achievements in Reporting Period

- Finance, HCM, Payroll Integrations – Business Verification (pre-load)
- Payroll Data Harvesting, Data Mapping, Pre Tenant data validation
- Data Extraction, Transfer, Load (ETL) for UAT and Training tenant
- End to End testing – Including most Integration and Data validation testing
- System integration development – 75% complete
- System Cutover planning sessions – 70% complete
- Training and Adoption plan complete

Key Actions Planned for Upcoming Period

- Payroll Parallel test and UAT tenant build
- System integration development continues
- End User Communications and Training
- Payroll Parallel testing – Payroll Verification and Validation - First cycle and second cycle
- Business Readiness plan and the Stakeholder and Process Impact summary
- Gold (Production) tenant build
- Final Data pull for Production tenant
- Go-Live

Health Check

Scope	Schedule	Budget: In-Year	Budget: Future	Overall
G	G	G	G	G

Status Update and Plan to Green (if applicable)

- The Enterprise Resource Planning program is predominantly on track. Scope, Schedule and Budget are trending green. We continue to monitor and manage the issue of Resource constraint and its impact on scope, schedule and budget. *See identified issue on second slide*

Project Milestones	Target Date	Expected Completion
Plan Phase	April 2022	June 2022
Architect & Design Phase	June 2022	November 2022
Configure & Unit Test	November 2022	February 2023
Testing – End2End, Payroll Parallel, User Acceptance (UAT)	February 2023	July 2023
Training and Adoption	May 2023	September 2023
Deploy	July 2023	September 2023
Transition to operations	September 2023	October 2023

Budget

Approved Amount	$13,980,700
Spent to Date	$ 9,711,782

Program/Project Status Report – Enterprise Resource Planning (ERP) Program
Reported By: Ade Ogunkoya, Project Mgr.; Rob Delorme, Snr. Program Mgr.

Reporting Period: Feb 2023 – May 2023

Critical Risks	Likelihood	Impact	Response Strategy

• **Dependency on output from other City projects and initiatives -** Special focus on the Enterprise Asset Management project (EAMS). The ERP Workday implementation project (both the Human Capital Management workstream and Financial/Payroll workstream) has a strong dependency on the output of Business decisions that will impact final Workday Process design and ultimately, integration design.
  • There is the possibility that the timelines of the ERP program may be stretched to accommodate the expected changes due to the dependency on the EAMS project.
    • If this happens, there will be delays and/or immediate missed opportunity for all the process optimization expected.
	High	High	• **Mitigate:** Stay connected with other Project Managers and Sponsors to continue to identify dependencies, expected outcomes and align timelines. The ERP Program team has continued to collaborate with the EAMS team to ensure we are aligning timelines and expectation.
			  • **Other options**: Should this risk become an issue, the ERP team and the EAMS team will investigate and realign, prioritise and focus on the most critical pieces of work with the limited resource and/or time available.

• **Change Resistance**: The amount of expected change associated with the ERP program and other initiatives within the organization on the Stakeholders could cause change resistance or change fatigue.	Medium	Medium	• **Mitigate:** A change management plan that is focused on better user adoption and reduction of change resistance is developed and currently being actioned.

Critical Issues	Impact	Response Strategy
ERP Dedicated team - Resource constraint (Previously identified risk) - Due to the pace of the project and the deliverables/additional work required due to re-work (Job Evaluation, Org Chart review, Data Validation, Hundreds of E2E test scenarios), the ERP Project has exhausted all built-in surplus time in the schedule. The Core team are feeling the pressure on their ability to perform all assigned tasks. In some cases, the tasks, have now become concurrent, dependent on the same resources and subsequently the Project timeline.	High	• Reassess the project plan and Go-Live date to accommodate conflicting dates and tasks as much as possible – *Implemented* • Decouple concurrent tasks that are assigned to a resource or group to ensure there is appropriate time to accomplish the tasks assigned starting with critical or foundational tasks – *Partially implemented*

Program/Project Status Report – Enterprise Asset Management Solution (EAMS)
Reported By: Bojan Sifrer, Project Mgr. and Robert Delorme, Snr. Program Mgr.

Reporting Period: Feb 2023 – May 2023

Project Summary

- Implementation of an enterprise software solution to improve asset maintenance and capital planning activities for the city of Burlington's assets including linear, fleet, equipment, and facilities.
- Aligned to: Burlington Strategic Plan (4.1); Vision to Focus (Focus Area 5); Corporate IT Strategy (5); Corporate Policy Strategic Asset Management.

Key Achievements in Reporting Period

- Workday integration (business) specification (scope) to implementation partners
- Project budget impact assessment, draft
- Business/data discovery and data review/prep continuing or initiated:
  - Transportation (nearing completion)
  - Fleet (Corporate, Transit and Fire)
  - Roads-Drainage-Sidewalks-Transit Stops
  - Corp. Inventory (nearing completion)
  - RPF Park Operations-Public Art-Tyandaga (kicked off May)
- Minor integrations/system replacements scoped as applicable as part of preceding
- Communications/Stakeholder program continuing
- Cemetery configuration in prep; external sample configuration loaded
- Collaborating with related workflow initiative to address shared asset registry workflows

Key Actions Planned for Upcoming Period

- Workday integration implementation partner quotations approved, initiation of design-build
- Transportation sub-phase business process approved for configuration; Fleet business process draft; schedule for related testing
- Continuing with sub-phase business/data discovery and data review/prep:
  - Roads-Drainage-Sidewalks-Transit Stops
  - RPF Park Operations-Public Art-Tyandaga
- Continue Communications/Stakeholder program

Health Check

| Scope | G | Schedule | Y | Budget: In-Year | G | Budget: Future | R | Overall | R |

Status Update and Plan to Green (if applicable)

- Scope: Minor adjustments addressed as part of requirements discovery; understood at outset and being addressed via change orders. (Green)
- Schedule: Adjusted to align with ERP; continued risk to 2023/early 2024 milestones due to project resource risk. Mitigation in progress re project team recruitment. (Yellow)
- In year budget on-track (2023). (Green)
- Future budget at risk. Additional capital funding required through 2024 budget cycle. Defining budget need in progress. See Critical Issues (Red)
- Currently underway: Business process, data and configuration requirements across multiple in-scope groups.

Project Milestones

Project Milestones	Target Date	Expected Completion
Phase 1-1 Core System	Jun 2021	Jul 2021
Workday Integration	Oct 2023	-
Phase 2-1 Business Services and Core Components	Q4 2023	-
Phase 2-2 Transportation Services	Q4 2023	-
Phase 3-1 Fleet	Q1 2024	-

Later phases addressed in subsequent reporting

Budget

Approved Amount	$4,356,300
Spent to Date	$2,214,738

Program/Project Status Report – Enterprise Asset Management Solution (EAMS)
Reported By: Bojan Sifrer, Project Mgr. and Robert Delorme, Snr. Program Mgr.

Reporting Period: Feb 2023 – May 2023

Critical Risks	Likelihood	Impact	Response Strategy
• **Overlapping EAMS and ERP go-lives and competing staff commitment:** Both projects will require effort commitments on the part of key city staff to support project activities related to process change, training and go-live activities.	High	High	• Accept / Mitigate: Pro-active involvement of EAMS-ERP program staff and business area management to prioritize commitments, and manage through changes with appropriate communication and expectation management. Continuous activity prioritization balancing operations and projects.
• **Business Stakeholder Resourcing / Availability**: Required for: a) participation in requirements discovery processes, and b) data compilation/ preparation/ collection of data required for system import.	High	High	• Mitigate: Pro-active involvement of business area management. Identify business-led data collection initiatives. Lessons learned to be applied in subsequent project phases.
• **Data:** Asset registry data required for system implementation is less complete and less-aggregated than anticipated, requiring greater-than-anticipated effort to identify, validate, and compile.	High	Medium	• Mitigate / Accept: Work iteratively with business stakeholders and implementation partner to focus on essential information needed and build configuration on this basis. Communicate and support stakeholders in cases where (business-led) data collection will be needed for operationalization.
• **Complex Integration Environment:** EAMS related integrations and a strong dependency on the Workday implementation requires close coordination of activities to align timelines and tasks to reduce duplication and rework.	High	High	• Mitigate: Participate in cross-functional meetings to discuss sequencing, timing and dependencies of various integrations. Work closely with other project managers to coordinate activities.

Critical Issues	Impact		Response Strategy
• **Additional capital budget funding will be required to fully complete the EAMS implementation project**. Original budget was established and approved in 2018. Timeline changes, additions to original scope, resourcing challenges and the introduction of the ERP project have delayed the project and expanded the original project.	Project will not be completed without additional funding. All work will pause and significant time and effort will be spent to re-establish project plan and acquire knowledgeable resources to resume work should funding not be committed.		• **Avoid: D**etermine and define additional funding requirements to complete project past current fiscal year ('23) and submit for approval in 2024 capital budget planning cycle.
• **Project Staffing:** The EAMS Project team is lean-staffed and has no redundancy in key roles. Resource changeover continues to happen.	High		• **Mitigate:** Staffing issues arise due to factors outside of project control. Mitigate where possible, recruit and replace as required. Leverage business area staff for implementation activities, provide relevant information to inform business area staffing/recruitment.
• **Timely Decisions and Approvals**: The collaborative nature of the City's approach to decision-making could extend program timelines and subsequently budget. Timely approvals are imperative to maintain project progress and momentum.	High		• **Mitigate**: Appy decision-making guidelines, as cited in the ESSC Terms of Reference. Apply escalation as risks emerge and as warranted.

Program/Project Status Report – Automated Vehicle Locator
Reported By: Paul Swioklo, Manager of Fleet & Ron Sangle, Fleet Business Improvement Specialist, RPF

Reporting Period: Feb 2023 – May 2023

Project Summary

- Deploy modernized, intuitive and easy to use enterprise AVL software that enables enhanced customer service and streamlined business processes.
- Aligned to Burlington Strategic Plan 3.2b 'The city's operations are net carbon-neutral' and 4.1.b 'City information is more accessible with an increase in the number of residents who engage with the city. The city practices open government and uses new technology to engage residents and collaborate in decision-making'. Aligned to Vision to Focus (Focus Area 3 'Supporting Sustainable Infrastructure and a Resilient Environment' & Focus Area 5 'Delivering Customer Centric Services with a Focus on Efficiency and Technology Transformation').

Key Achievements in Reporting Period

- ELD (Electronic Logging Device) vendor for DVIR (Digital Vehicle Inspection Report) and HOS (Hours of Service) pilot testing initiated. Administrative training complete for portal administrators.
- Completed map updates to Burlington's Public Facing Portal allowing for accurate tracking of plowed sidewalks.
- Initiated conversations with the Fire Suppression team on the implementation of AVL for all frontline fire apparatus, mechanical support vehicles, training support vehicles and fire prevention vehicles.

Key Actions Planned for Upcoming Period

- Complete onsite training and testing of ELD solution
- Finalize selection of ELD application
- Opti path route optimization pilot

Health Check

Scope	Schedule	Budget: In-Year	Budget: Future	Overall
G	G	G	G	G

Status Update and Plan to Green (if applicable)

- Implementation and training of city staff for the ELD (Electronic Logging Device) for DVIR (Daily Vehicle Inspection Report) and HOS (Hours of Service) application to commence in Q3/Q4 pending successful pilot.
- Burlington's Public Facing Portal for sidewalk clearing will go live in the beginning of winter control season 2023.
- Implement route optimization for various services pending a successful pilot.

Project Milestones

Project Milestones	Target Date	Expected Completion
Privacy Impact Assessment	02/22	Closed
AVL Winter Hardware Installation and Turn by Turn Configuration	02/22	Closed
System Integrations	02/22	Q4 2023
Completion of ELD Training (over 280 users)	09/22	Q3/Q4 2023
Project Governance structure and responsibilities	09/22	
Project close	9/22	Re-baseline

Budget

Approved Amount	$1,858,186.00
Spent to Date	$ 774,810.44

Critical Risks	Likelihood	Impact	Response Strategy
• Selection of the ELD application is dependant on a successful pilot test	Low	Low	• Testing is being conducted on proven ELD solutions, likeliness of a failed pilot test is low

Critical Issues	Impact	Response Strategy
• N/A		

Program/Project Status Report – Non-Union Job Evaluation
Reported By: Laura Boyd, Executive Director, Laura Atanas, Manager, Total Compensation & Data Analytics and Marylisa Forsyth, HR Representative

Reporting Period: Feb 2023 – May 2023

Project Summary

- The Job Evaluation Project is a foundational component of attraction and retention and enables the City to update our non-union compensation design and structure to be reflective of current and future workplace requirements. It is also supporting the City in its ability to be externally competitive and internally consistent among job positions and titles.
- Deliverables include (1) new job evaluation plan uniformly and fairly applied to all non-union jobs, (2) new pay structure and compensation philosophy (3) repository of fully evaluated non-union job questionnaires with consistent application of job titles and (4) pay equity review of the results

Key Achievements in Reporting Period

- Began Pay Equity Analysis with Gallagher Benefit Services (external consultant)
- New grade structure has been finalized and configured into Workday
- 99% completion rating of all positions utilizing the new Job Evaluation rating system
- Completed a BMT presentation to all People Leaders on JE updates and new compensation model
- Second round of department meetings occurred with all ED's and Directors, provided leaders with final outcomes of JE results. Introduced a Job Title review, whereby leaders have an opportunity to submit proposed job titles for their direct reports. The goal is to ensure titling at the City follows a consistent framework. Leaders also provided with preliminary look at employee impacts resulting from JE outcomes.
- Began reconciliation of JE costing data with actual budgeted dollars to prepare for implementation
- Developed framework for applying JE retro dollars to eligible staff

Key Actions Planned for Upcoming Period

- Finalize Job title Framework and apply to non-union job titles, review submitted proposals from department leaders, adjust and review outliers
- Finalize new structure and hand-off to Workday team for implementation and September launch
- Finalize Pay Equity analysis with Gallagher
- Finalize Appeal Process and JE roll-out plan, in coordination with Workday
- Prepare JE communication plan around retro payment, People Leader training for communicating JE outcomes to staff.
- Develop People Leader JE training content and material to be delivered through OTR
- Prepare JE notification letters to staff

Health Check

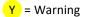|				Overall
Scope **G**	Schedule **G**	Budget: In-Year **Y**	Budget: Future **G**	**G**

Status Update and Plan to Green (if applicable)

- Project timelines and implementation have direct dependencies on Workday launch/go-live event.
- In-year budget at risk, additional funding is required to finalize and wrap-up project expenditures for consultant services which are expected to end in June 2023.

Project Milestones	Target Date	Expected Completion
Develop modernized Job Evaluation Plan	Q1 2021	completed
Design, train & complete Job Information Questionnaires (JIQ)	Q2 2021	completed
JIQs approved by two levels of supervisor	Q4 2021	completed
Ratings Assigned	Q2 2022	99% completed
Jobs placed in new salary structure and recommend new titles	Q2 2023	In progress
JE data set provided to Workday for implementation	Q2 2023	In progress
Develop and finalize Appeal process, update Compensation Policies	Q3 2023	On track
Communicate JE Results	Q3 2023	On track
Development	Q3 2023	On track

Budget

Approved Amount	$182,000 for consultant services
Spent to Date	$175,932

Legend: **R** = At Risk   **Y** = Warning   **G** = On Track

CITY OF Burlington

Version Feb '23

Program/Project Status Report – Non-Union Job Evaluation

Reported By: Laura Boyd, Executive Director, Laura Atanas, Manager, Total Compensation & Data Analytics and Marylisa Forsyth, HR Representative

Reporting Period: Feb 2023 – May 2023

Critical Risks	Likelihood	Impact	Response Strategy

• Project timeline may be impacted based on:
  o the cost and approvals to implement the findings of both the Job Evaluation results and the market assessment
  o Cost to implement the recommendations for the compensation related policy updates and required approvals
  o Staffing available to complete tasks.
	High	High	• **Mitigate:** Stay connected with Steering group and Sponsors to clearly identify outcomes as soon as they are known and design a phased implementation plan in accordance with the approved budget

• Acceptance by City Employees of the new job evaluation project outcomes: This project touches compensation both current and future for all non-union employees and they need to understand the outcomes and process to get to the outcome.	Medium	Medium	• **Mitigate:** Change management plan including a clear communication plan and regular updates to BLT via People Leader Resource and on 360 project page
• Change Resistance: The amount of change associated with the JE project, the length of time to implement from start to finish along with other initiatives within the organization on the Stakeholders could cause change resistance or change fatigue.	Medium	Medium	• **Mitigate:** A change management plan that is focused on reduction of change resistance has been developed, Next quarter the project team will finalized the communications for People Leaders as a follow up from the Job Evaluation Roadshows
• Incomplete, out of date and poor quality JIQs submitted or approved by departments	High	Medium	• **Mitigate:** Continue to work with Directors and Executive Directors to encourage completion. If not completed, current job descriptions will have to be used going forward. Stay up to date with newly created or revised positions to ensure JIQs are reflective of position scope
• Timing with Workday – if ERP timelines change, then this project will have to adjust implementation timelines in alignment with the system. This will result in additional costs and resources required to reconfigure and update the Workday system and will cause a delay in roll out of new compensation grades/structure.	High	High	• **Mitigate**: Continue to work with Consultant to expediate findings to ensure we are aligning timelines and expectations. Make a decision to pause this project or provide more resources to focus and complete.
• Staffing of Project: Project is being completed off the side of a Human Resources employee's desk. 1 FTE is on contract until September 2023	High	High	• **Mitigate:** Strongly consider additional resources for 2023 to finish off the key components of the project. Post implementation activities include: Appeals, re-evaluations and new evaluations.

Critical Issues	Impact	Response Strategy
• Collision of project training activities between JE and Workday impacts the delivery and timing of communicating JE outcomes	June - August	Meeting initiated with Workday and JE stakeholders to review and adjust timing of JE outcomes

Legend: **R** = At Risk   **Y** = Warning   **G** = On Track

Version Feb '23

CITY OF Burlington

Program/Project Status Report – Property Tax Software Program
Reported By: Maxine Rukundo, Project Manager; Ann Marie Coulson, Project Champion

Reporting Period: Feb 2023 – May 2023

Project Summary

- Implementation of the CentralSquare property tax software solution (CS).
  - The property tax software is used to bill and collect property taxes, process tax adjustments and track, inquire, and report on property tax records. The tax software is used to bill and collect property taxes on behalf of the City, Region and local school boards.

- Aligned to Vision to Focus – Focus Area 5- Delivering Customer Centric Services with a focus on efficiency and technology transformation.

Health Check

Scope	Schedule	Budget: In-Year	Budget: Future	Overall
G	G	G	G	G

Status Update and Plan to Green (if applicable)

- Concluded Milestone 1. Milestone 2 and 3 (of 4) are ongoing. Currently finalizing validation of migrated data; as well as integration configuration. Orientation of the broader tax team on core processes is underway.
- Burlington continues to be apart of CS Early Adopters User Group Program which includes other Ontario municipalities in the process of replacing their property tax billing and collection software system.

Key Achievements in Reporting Period

- Completed the Privacy Impact Assessment (PIA) exercise
- Concluded Milestone 1 including review of the Business processes
- Finalized user-training plan
- Obtained approval to use a 3rd party system to issue Tax Certificates
- Began testing the integrations, including Amanda and PerfectMind

Project Milestones

Project Milestones	Target Date	Expected Completion
Project Initiation and Plan	01/2022	03/2022
Privacy and Risk Assessment	06/2022	02/2023
Configuration & Integration	11/2022	04/2023
Final Data Conversions	01/2023	07/2023
Testing and Training	01/2023	08/2023
Deployment and Project Close	03/2023	12/2023

Key Actions Planned for Upcoming Period

- Obtain sign-off on the Privacy Impact Assessment (PIA)
- Sign contract with 3rd party vendor (to issue Tax Certificates)
- Complete configuration of the solution and integrations
- Confirm Go-Live date
- Validate all user documentation
- Establish user training plan and schedule (including non-Tax staff)

Budget

Budget	
Approved Amount	$ 1,500,000
Spent to Date	$ 687,130

Legend: R = At Risk   Y = Warning   G = On Track

CITY OF Burlington

Version Feb '23

Program/Project Status Report – Property Tax Software Program
Reported By: Reported By: Maxine Rukundo, Project Manager; Ann Marie Coulson, Project Champion

Reporting Period: Feb 2023 – May 2023

Critical Risks	Likelihood	Impact	Response Strategy
• **IT resource availability:** Several projects and initiatives are underway that may impact availability of BDS resources to support the integrations configuration, for example: ERP, CRM, EAMS all of which tap into the IT resources at the city.	Medium	Low	• **Risk Mitigation:** Collaborative efforts across project teams are underway to adjust project schedules and resource plans to ensure availability of required resources. Continue to maximize use of the vendor resources available to us.
• **Complex Integration:** Amanda integration with CentralSquare's Tax solution depends on an intricate configuration. Timely completion maybe impacted by the complex logic required by this integration.	Medium	Medium	• **Risk Mitigation:** Increased cross-functional consultation and collaboration in BDS to support the project's technical lead to complete tasks timely.
• **Vendor Bandwidth**: CS' development environment currently has low bandwidth which negatively impacts functionality review and user confidence in the replacement system.	Medium	Low	• **Risk Mitigation:** CS is aware of the issue and has committed resources to resolve the problem. CS has provided guidance around which processes hog system resources in order to reduce the negative impact on the team as they progress through review of key businesses processes.

Critical Issues	Impact	Response Strategy
• N/A		

Legend: 🔴 **R** = At Risk   🟡 **Y** = Warning   🟢 **G** = On Track

CITY OF Burlington

Version Feb '23